

Hegemony and Imperialism in the Modern World-System: A Framework for Analyzing Core-Periphery Relations in the 21st Century

**Hegemonia e imperialismo no sistema-mundo moderno: propondo um
modelo para pensar as relações centro-periferia no século XXI**

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Abstract: This article aims to: (a) provide a brief analysis of the debate surrounding the concepts of imperialism and hegemony; (b) propose a heuristic model for analyzing core-periphery relations in the 21st century; and (c) examine the most-cited articles in the field of imperialism studies through the lens of the proposed model. We analyze the six most-cited contemporary articles in the Scopus database, identified using the keywords "Imperialism," "Capitalism," and "State". Based on our proposed model, which characterizes imperialism as the intersection of accumulation by dispossession and extortion, our findings reveal that: (a) all six articles emphasize the logic of capital accumulation (manifested in the construction of monopolies and the pursuit of extraordinary profits) as a central element of imperialism; and (b) three of the six articles also highlight aspects related to militarism, such as the use of force and the extortion of peripheral regions by core countries, as key features of the imperialist phenomenon. Therefore, when discussing 21st-century imperialism, the authors converge on the centrality of capital accumulation through dispossession as a defining feature of imperialist processes. However, power projection through extortion emerges as a point of divergence. Thus, our heuristic model, by delineating the conceptual boundaries between hegemonic and imperialist projection, highlights this gap and underscores the importance of discussing the core-periphery dialectic through clearly defined analytical categories.

Keywords: Capitalism; United States; Hegemony; Imperialism; Militarism.

Resumo: Este artigo tem como principais objetivos: (a) realizar uma breve análise do debate em torno dos conceitos de imperialismo e hegemonia por meio da proposição de um modelo heurístico que contribua para pesquisas empíricas direcionadas a esse tema; e (b) efetuar uma análise dos artigos mais citados no campo de estudos sobre imperialismo, examinando-os à luz do modelo heurístico proposto. Neste estudo, observamos os seis artigos contemporâneos mais citados no banco de dados Scopus, encontrados a partir da pesquisa dos radicais “*Imperialism*”, “*Capitalism*” e “*State*”. Com base no modelo proposto, que caracteriza o imperialismo como uma intersecção entre a acumulação por espoliação e a extorsão/uso da força, nossas descobertas revelaram que: (a) os seis artigos identificados enfatizam a lógica de acumulação de capital, materializada pela construção de monopólios e pela busca por lucros extraordinários, como um elemento central do imperialismo; (b) três dos seis artigos também consideram expressões relativas ao militarismo, como o uso da força e a extorsão de regiões periféricas por países centrais, como elementos cruciais do fenômeno imperialista. Portanto, observa-se que, ao discutir o imperialismo no século XXI, há uma convergência dos autores sobre a centralidade da acumulação de capital por vias de espoliação em processos imperialistas. Contudo, a projeção de poder por meio da extorsão/uso da força se coloca como um elemento de dissonância. Assim, a nossa proposição de elaborar um modelo heurístico que estabeleça as fronteiras conceituais entre projeção hegemônica e imperialista permitiu a identificação dessa lacuna, suscitando a importância de se discutir a dialética centro-periferia a partir de categorias analíticas definidas.

Palavras-Chave: Capitalismo; Estados Unidos; Hegemonia; Imperialismo; Militarismo.

1. INTRODUCTION

Payne and Silver (2022) employ Charles Tilly's definition to argue that, at the height of its expansion (1945-1973), the United States was a “legitimate protector,” understood as “someone who offers a necessary shield but has little control over the emergence of danger”. In the postwar decades, the United States exercised Gramscian hegemony, being perceived by allies as a consensual leadership that benefited its followers. Since the 1970s, however, the country appears to have adopted a rather extortionary and imperial posture instead of a hegemonic leadership, similar to a racketeer, by producing instability and “danger” in order to sell its protection. The authors emphasize the Trump administration (2016-2020) as the most notorious example of this extortionary face, both toward long-standing allies such as Germany and South Korea and toward hostile regimes, such as Syria, Iraq, and Afghanistan.

Silver and Payne's provocation provide the point of departure for this article. We begin with the debate over the conceptual boundaries between imperialism and hegemony, and pursue three objectives: (a) to map the debate on imperialism and hegemony; (b) to propose a heuristic model that sharpens the conceptual basis for empirical research on imperialist processes while contrasting them with Gramscian processes of hegemonic leadership; and (c) to analyze the most frequently cited articles and topics in imperialism studies in light of the model. The study is qualitative in nature and relies on literature review and bibliometric analysis.

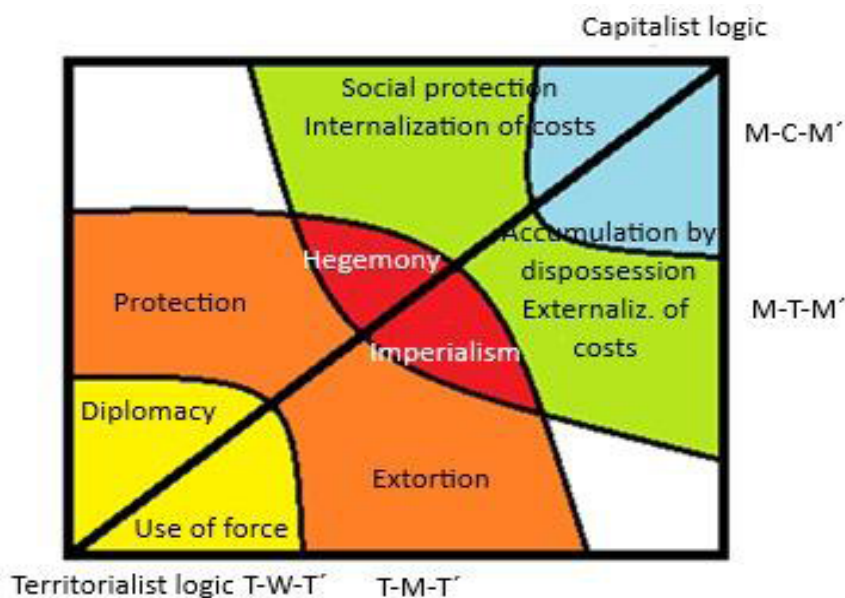
The article is organized into two sections, in addition to the introduction and final remarks. First, we present the heuristic model in light of the theoretical discussion on hegemony and imperialism. Second, we investigate the state of the art of academic production on imperialism based on a qualitative analysis of the six most-cited articles in Scopus. We then offer concluding remarks highlighting the importance of theoretical-conceptual discussions and heuristic devices for understanding hegemony and imperialism within the International Political Economy field.

¹ About the debate, see: PANITCH, Leo; GINDIN, Sam. Global Capitalism and American Empire. *Socialist Register*, v. 40, p. 1-42, 2004. NEXON, Daniel H.; WRIGHT, Thomas. What's at stake in the American Empire debate. *American Political Science Review*, v. 101, n. 2, p. 253-271, 2007. SAULL, Richard. Empire, Imperialism, and Contemporary American Global Power. *International Studies Perspectives*, v. 9, p. 309-318, 2008. DESTRAI, Sandra. Empire, Hegemony, and Leadership: Developing a Research Framework for the Study of Regional Powers. *GIGA Working Papers*, nº 79, 2008. MILIOS, John; SOTIROPOULOS, Dimitris P. *Rethinking Imperialism: a study of capitalist rule*. Nova Iorque: Palgrave Macmillan, 2009. 248 p. PRYS, Miriam; ROBEL, Stefan. International Studies Perspectives. *Journal of International Relations and Development*, v. 14, p. 247-279, 2011.

2. DELIMITING CONCEPTUAL BOUNDARIES BETWEEN HEGEMONY AND IMPERIALISM IN THE 21ST CENTURY: A HEURISTIC PROPOSITION

The figure below presents a heuristic model that distinguishes hegemonic projection from imperialist practice by core countries. The model starts from the fundamental premise that the modern world-system is divided into two distinct subsystems: (1) the interstate system, composed of states that operate according to a territorialist logic of power accumulation; and (2) the capitalist world-economy, composed of firms that operate according to the capitalist logic of power build-up, namely, the relentless pursuit of capital accumulation (Wallerstein, 2006; Arrighi, 1996). The intersection between the two subsystems (in red) is the arena where the hegemonic and/or imperialist projection of core over peripheral nations occurs. This model represents a theoretical simplification, intended to facilitate comprehension and provide an explanation for the hegemonic and/or imperialist conduct of major powers.

Figure 1. The boundaries between hegemony and imperialism across capitalist and territorialist logics of power accumulation



Source: authors' elaboration.

2.1. Imperialism and hegemony within the capitalist logic of accumulation

In the upper-right corner of the model lie the blue and green areas, representing the subsystem of the capitalist world-economy, structured by the hierarchy of the international division of labor and global value chains across core, semiperipheral, and peripheral zones (Wallerstein, 2006; Kano, 2020). The blue region corresponds to the organic core - the competitive frontier between leading business models. Here, firms merge, vanish, relocate, adapt their product niches and production networks, and often move into finance (Harvey, 2005; Silver, 2014). This environment is characterized by Marx's formula of capital accumulation: money-commodity-more money/capital (M-C-M'). Given the tendency for profit rates to fall, firms are continually compelled to explore new channels of accumulation, especially in peripheral and semiperipheral zones (the green area).

Karl Polanyi (2000) and Beverly Silver (2014) argue that capitalism has oscillated in a pendulum movement between state-led social protection (in the postwar period) and the advance of market forces (in the 19th-century world order and the post-1970s financial globalization). Our argument is that these processes are simultaneous and are primarily delineated by spatial rather than temporal distinctions; that is, the fundamental differentiation is where, not when. In our model, we ask: in

which regions of the capitalist world-economy (where) do state's social protection or market-driven dispossession prevail? This dichotomy exists even within countries at the technological frontier (blue area), but it becomes more evident when firms from the organic core (where social protection tends to prevail) export capital and expand globally to peripheral areas where dispossession prevails (green area).

The blue region above the diagonal line represents the sphere of the capitalist world-economy in which the distributive face of capital prevails. Market forces are compelled to mitigate inequality and to share national wealth more equitably by internalizing production costs. This configuration results from the influence of social-protection forces emanating from the state, trade unions, and other social movements. It is in this arena that new working classes emerge, as a consequence of capital's transformative agency, thereby generating novel interactions and imperatives that compel firms to internalize social and environmental costs, increase salaries, and accede to labor union demands (Silver, 2003). Here, labor and the state converge to exert pressure on surplus value.

Simultaneously, however, processes of accumulation by dispossession (Harvey, 2005) and super-exploitation of labor (Martins, 2011) are observed, as represented by the blue area below the diagonal line in the heuristic model. The same state that disciplines markets also provides the conditions for domestic firms to grow through protectionism, artificially low interest credit, government bidding, and repression of anti-systemic movements. Furthermore, the state is often condescending with breaches in the social contract previously established with firms, which tend to externalize production and socio-environmental costs. Consequently, increases in profit are not only associated with innovations in production, circulation, and consumption, but also with the extraction of relative surplus value and accumulation by dispossession, particularly when enhanced productivity is linked to the depreciation of labor power and extended working days (Martins, 2011).

Thus, simultaneous dynamics of social protection and dispossession can be identified within the same state, be it in core or in the periphery of the system. Consider the United States between the Civil War and the end of World War II. On the one hand, white middle classes in major cities such as New York, Chicago, and Los Angeles were incorporated into dynamic sectors - corporate management, insurance, banking services, advertising, and the cultural industries. For this class stratum there was some social protection and union advances, particularly after the 1929 crisis. Conversely, low-income white populations in rural areas and formerly enslaved or emancipated African Americans, particularly in southern states like Alabama, Louisiana, and Texas, constituted reservoirs of super-exploited labor, subsequently integrated into urban factories and construction sectors (Leon, 2017; Zonderman, 2021). "It is a painful and notorious fact that the last condition of the common laborers of the South is, in many respects, much more degrading and demoralizing than the first [...]. The colored people of the South are gradually, as a class, sinking deeper and deeper into the cesspool of industrial slavery" (Swinton, 1886 apud Arnesen, 2021).

A second example emerges from the English family-based industry of the 19th century. It is crucial to differentiate between two modalities of capital-state relations prevalent during that period. The first emerged in the major cities of England, where the state provided public goods such as sanitation and street lighting and offered minimal social protection to workers - which were precarious by contemporary standards (Mann, 2012). The second case concerns the relations between Imperial England and cotton producers in British India, to whom costs were externalized, local labor was super-exploited, and anti-systemic movements were repressed. This resulted in extraordinary profits for large English textile firms, transport services, and, particularly, the cultivation of opium destined to China. This dynamic took place under the British military power, whose objectives were the defense of the empire and the extraction of resources from the colony (Desousa, 2010; Bhambra, 2021).

The same dialectic marked the French state's relationship with Paris's proletariat (Cross, 1985) in contrast with its early-20th-century colonies in sub-Saharan Africa and Indochina (Rossi, 2023). A similar duality can be identified in the U.S. relationship with its urban middle class during the postwar "Golden Age of Capitalism," compared with the actions of U.S. firms and government in the Third World (Bresser-Pereira, 2020). In summary, we contend that while exploitative and predatory relations exist within industrialized nations, their intensity substantially escalates when considering the influence of central states and corporations on peripheral regions, thereby instigating the debate on imperialism due to their underlying motivations and resultant consequences.

Classical perspectives on imperialism maintain that the export of capital originates from economic crises in metropolitan nations characterized by mature capitalism, and that these nations adopt imperialist policies as their domestic markets reach saturation. Peripheral regions, therefore, serve as "pressure valves," alleviating labor unrest and conflicts within industrialized nations while simultaneously addressing the declining rate of profit (Hobson [1902] 1981; Luxemburg [1913] 1970; Lenin [1917] 2005). Boron (2007) challenges this view by showing that the economic expansion of core countries into the periphery occurs not only in crises but also during periods of material prosperity, as exemplified by U.S. capital export in the post-war era.

Thus, either in crisis or prosperity periods, firms from core countries tend to project their logic of capital accumulation onto the periphery. This establishes a necessary, though not sufficient, condition for imperialist or hegemonic behavior. While

the classical theories of the early 20th century identified capital export as the primary indicator of imperialism, since then, the process has turned more complex, incorporating financial services (including loans and grants), international trade, productive integration through global value chains, currency-swap agreements, construction services, and foreign direct investment (Fontes, 2015; Roberts, 2021).

Drawing on Arrighi's (1996) framework of capitalist power accumulation, it is imperative to examine the projection of capital from core to periphery, conceptualized as the money-territory-more money/capital (M-T-M') function. Within this dynamic, the control exercised by core states over foreign territories, through the projection of power across geographical space, ultimately aims to secure the endless capital accumulation for their corporations. The objective is to ensure that capitalist endeavors in the periphery (whether within a sovereign country, a protectorate, or a colony) preclude a falling in the rate of profit and foster monopolies that assure extraordinary profits for firms based in the core.

In light of Polanyi's pendulum, Silver (2014) argues that core firms' economic influence on peripheral countries tends to take two forms. On the one hand, there are arrangements under which a social contract protects workers from market forces, reduces class disparities, and compels capital to internalize socio-environmental costs. Here the pendulum swings toward the labor side, reinforcing the legitimacy of the social order (Silver, 2014). This is exemplified by "development by invitation" under the Keynesian states in postwar Western Europe and Japan. In these cases, U.S. capitalism produced unprecedented socio-economic progress for its allies, cementing the hegemonic character of U.S. leadership. The Marshall Plan represented the internationalization of the social pact promoted by the New Deal (Arrighi, 1999), corresponding to the green area above the diagonal line in the heuristic model (Figure 1).

The second pole is marked by super-exploitation of labor and capital accumulation that rests on unjust appropriation of resources (green area below the diagonal line). Silver (2014, p. 58) argues that the failure of the hegemonic accumulation model to deliver equal development between core and peripheral states leads to "a profound legitimacy crisis for capitalism". Combined with falling profit rates in the core, the pendulum swings toward market forces, replacing social protection for capital's freedom. Profits rise (without social justice), wage repression spreads, and environmental harms are socialized in a process named by Harvey (2005) as "accumulation by dispossession". In his own words:

These include the commodification and privatization of land and the forceful expulsion of peasant populations (as in Mexico and India in recent times); conversion of various forms of property rights (e.g. common, collective, state) into exclusive private property rights; suppression of rights to the commons; commodification of labour power and the suppression of alternative (indigenous) forms of production and consumption; colonial, neocolonial and imperial processes of appropriation of assets (including natural resources); monetization of exchange and taxation, particularly of land; the slavetrade (which continues particularly in the sex industry); and usury, the national debt and, most devastating of all, the use of the credit system as radical means of primitive accumulation. The state, with its monopoly of violence and definitions of legality, plays a crucial role both in backing and promoting these processes, and in many instances has resorted to violence. To this list of mechanisms we may now add a raft of additional techniques, such as the extraction of rents from patents and intellectual property rights and the diminution or erasure of various forms of common property rights (such as state pensions, paid vacations, access to education and health care) won through a generation or more of social democratic class struggle (Harvey, 2006, p. 153).

In short, the **where** matters more than the **when**: the Marshall Plan's welfare-state and the Third World's super-exploitation by U.S. firms unfolded simultaneously, in different places.

Ellen Wood (2002) posits that the foundational instance of this phenomenon was England's ascendancy over Ireland during the 17th century. Initially, English agriculture was integrated into a market economy through rural real-estate booms, enhanced productivity, increased land profitability, and the alienation of workers from the tangible product of their labor (which subsequently became quantifiable as wages per hour rather than total output). This generated economic and legal innovations, including distinctions between productive and unproductive land, improved soil fertility, enclosures, and new conceptions of property rights. Subsequently, English aristocrats and jurists pressed the monarchy to occupy Ireland. Colonization was morally justified by appealing to divine rights and the expected profits from civilizing the uncivilized territory. There were plans to transplant English and Scottish peasants and even Spanish Moors, to introduce capitalist agriculture on the island. A letter from the elite to the British crown illustrates the process:

Again, his majesty may take this course in conscience because it tendeth to the good of the inhabitants many ways; for half their land doth now lie waste, by reason whereof that which is habited is not improved to half the value; but when the undertakers [the settlers] are planted among them ... and that land shall be fully stocked and manured, 500 acres will be of better value than 5000 are now (Wood, 2002, p. 160).

Therefore, the justification for colonization was not the lack of occupation or cultivation of land in Ireland, but rather the value of production according to capitalist criteria, in a ratio of 10 to 1. We argue that this logic precisely underpins accumulation by dispossession, manifesting in diverse forms across centuries. Thus, a “genetic inheritance” of capitalism persists, from the 17th-century English cartographic surveys of Ireland to the 21st-century geographic mapping of the agricultural frontier in the Brazilian Amazon via satellites and drones. This inheritance is characterized by the relentless pursuit of capital accumulation through cost externalization, dispossession, and the overexploitation of labor. As elaborated in the subsequent section, this logic is invariably accompanied by the application of force against groups and nations that resist these movements.

Unlike development by invitation, countries in this position were marginalized to the periphery of the capitalist world-economy, where their role was limited to providing primary commodities to core nations. Efforts by Third World countries toward economic nationalism and independent development were consistently suppressed through militaristic interventions or ostensible free trade policies dictated by the U.S. and Europe over allies, enemies and former colonies. Litvin (2003) emphasizes the United Fruit Company’s significant involvement in the 1954 Guatemalan coup. To safeguard its financial interests, the company actively lobbied the U.S. government for the overthrow of President Jacobo Árbenz. Interpreting the Guatemalan Revolution as a communist threat, Washington, through the CIA, implemented Operation PBSuccess, utilizing the company’s vessels for arms transport.

Therefore, contrary to what Payne and Silver (2022) argue, this is not a change in Polanyi’s Pendulum over time, that is, a transition from development by invitation in the post-war period (hegemonic projection) to the rise of neoliberalism and accumulation by dispossession from the 1970s onwards (imperialist projection). The fundamental distinction is spatial, not temporal, because the two models coexisted: the hegemonic model predominated in Western Europe and Japan, whereas the imperialist model exerted its influence in Latin America, Africa, and Asia. In essence, U.S. leadership presents a dual nature: one hegemonic, which tolerates protectionist policies among core allies; and the other imperialist, marked by the exploitation and extortion of both allies and adversaries within the periphery.

Consequently, a necessary condition for hegemony or imperialism lies in how core firms extend their influence into the periphery under capital accumulation (M-C-M’). Where accumulation entails arrangements that incorporate social protection and cost internalization, we have a necessary, but not sufficient, condition for hegemony. On the other hand, the predominance of market forces, accumulation by dispossession, and cost externalization constitutes a necessary, though insufficient, condition for imperialism. To achieve sufficiency, these processes must be complemented by the political-military dimension of power. Consequently, we turn our attention to the other sphere of the modern world-system: the interstate system and the management of armed conflict and geopolitical disputes.

2.2. Imperialism and hegemony within the territorialist logic

The yellow and orange areas in the heuristic model represent the second sphere of the world-system: the interstate system, where states operate according to a territorialist logic of power accumulation. Expansion, whether diplomatic or military, serves to enlarge the hegemon’s or empire’s areas of influence. The yellow area corresponds to the instruments through which core states interact with each other and project themselves onto the periphery, ranging from diplomacy to explicit use of force. In our model, diplomacy is associated with hegemonic projection, based on elite convergence and the use of incentives. The use of force is associated with imperialist projection, centered on punitive measures to obtain desired outcomes. This culminates in the formula territory-war-more territory (T-W-T’), as outlined by Fiori (2004).

The orange area delineates two distinct modalities through which major powers exert influence over peripheral regions: consensual protection and extortion. According to Tilly (1985), governments play the role of protection rackets. This term refers to “a criminal system of taking money from people in exchange for agreeing not to hurt them or damage their property” (Cambridge Dictionary, [2023]). The monopoly of violence serves as the instrument for executing racketeering, regardless of its legitimacy. Given that legitimacy is defined by the probability of other authorities complying with the decisions of a higher authority, Tilly (1985, p. 171) posits the supremacy of violence over legitimacy as central to protection rackets.

Protection thus has two senses. The first refers to shelter and defense offered by a powerful ally against potential threats. The second resembles the practice of gangs coercing residents and merchants to pay in exchange for “protection”, even when the threat is posed by the gang itself (Tilly, 1985). The boundary is thin between consented (legitimate) and coerced protection (imposed under threat of punishment). The former draws on Gramsci’s concept of hegemony, which occurs when a political actor possesses superior coercive capacity but primarily wields power through softer mechanisms such as economic and ideological cooptation (Augelli & Murphy, 2007, p. 205; Arrighi & Silver, 2001, p. 35). In this case, the leader is perceived

as beneficial to the collective. The latter is characterized by the predominance of coercion and the use of force - what Gramsci called “domination” and Tilly “extortion”.

We contend that these two definitions of protection underlie not only the domestic formation of modern states (Tilly, 1985) but also hierarchical relations among them. Asymmetries in the capacity to wage war and extract resources yield a spectrum of unequal relationships between a stronger actor (A) and a weaker one (B), oscillating between protection and coercion. Applying Tilly's concepts to international relations, we infer that when consensual protection predominates, we are observing hegemonic projection. When the extortionary face predominates, we see a characteristic element of imperialist projection.

Having distinguished between the dynamics of protection (hegemonic) and extortion (imperialist), the subsequent step involves comprehending that, within this environment of competition between great powers and their projection onto the peripheral regions, the logic of war persists, but, due to the asymmetry of wealth and power, it progressively converges with capitalist logic. That is, the territory-war-more territory (T-W-T') function is thus supplemented by territory-money-more territory (T-M-T'): resources extracted from the periphery serve to stimulate the territorial expansion (whether formal or informal) of the more powerful state (Arrighi, 1996; Fiori, 2004; Harvey, 2005). Competition among great powers, based on material capabilities, is thus shaped by contests for spheres of influence in the periphery, organized through consensual alliances and/or extortion. The motivation is not limited to territorial expansion through war, but also includes capital accumulation and monetary imposition by the stronger actor, seeking access to resources, markets, labor, and other inputs.

Let us consider the differing relevance of West Germany and South Vietnam to the U.S. during the Cold War. West Germany played a dual role: a bastion in the geopolitical containment of the USSR and a key market for U.S. transnational corporations. In this case we see consensual projection under T-W-T', coupled with T-M-T' as the country became an extension of U.S. capitalism. The result was an economy boomed by the Marshall Plan, trade protectionism tolerated by Washington, a welfare state capable of preempting socialist parties and a military umbrella through NATO.

South Vietnam, by contrast, became a puppet state into which the United States poured significant financial and human resources with limited capital returns, as its primary motivation was simply the military containment of Soviet influence. Instead of fierce protection and development by invitation, South Vietnam president, Ngô Đình Di'ém, was assassinated in 1963 in a CIA-backed coup when the Kennedy administration decided he could no longer manage the communist threat. Here the territorialist logic (T-W-T') was not successfully complemented by T-M-T' because Vietnam's economy offered much less profit rates than West Germany and, thus, U.S. projection ended in military defeat in 1975.

Where the extortionary face predominates, we have a necessary, but not sufficient, condition for imperialist projection (a combination of force and extortion). Where consensual protection prevails, we have a necessary, but likewise not sufficient, condition for hegemonic projection (a combination of diplomacy and protection). Attempts by weaker states to escape this framing are often repressed within the territory-money-territory (T-M-T') logic, producing extortion through economic and legal practices such as boycotts, sanctions, lawsuits, and pressure in international organizations. Contemporary examples of U.S. imperialist projection include Cuba and Iran. In extreme cases, such attempts trigger military action under the T-W-T' logic, such as coups and colonial or neocolonial wars, the most notorious being the U.S. invasion of Iraq. Conversely, governments that acknowledge the legitimacy and benefits of the protection they receive often evolve into formal or informal protectorates. In the context of U.S. hegemonic projection, Puerto Rico exemplifies a formal protectorate, while Japan serves as an informal one, given the significant role of U.S. protection for its territory.

2.3. The dialectic between coercion and capital in core-periphery relations

Our argument rests on the dialectic relation emanating from the core toward the periphery between the expansive logic of states and the logic of capital accumulation and surplus value extraction. The claim that imperialism results from the monopoly capitalism of the Industrial banking bloc (Hilferding [1910] 1985; Lenin [1917] 2005) captures only part of the picture, since states operate under their own logic of expansion and competition for power and territory. The late 19th century annexation of overseas territories by European powers was indeed a strategy to secure raw materials for burgeoning industries, but it was also a move to control strategic points and, ultimately, to prepare for war.

Imperialism thus arises at the intersection of economic dispossession and the use of force, continually assuming new forms. Harvey (2005) highlights the “new imperialism” that emerged in the 1970s in response to systemic crisis and the ensuing time-space reconfiguration. Since then, the neoliberal project has played a central role in weakening peripheral states and making them more vulnerable to systemic shocks. Privatization has been central to accumulation by dispossession, capitalizing vital goods such as water, displacing rural communities and replacing family farming with

agribusiness. International institutions such as the IMF, World Bank and WTO and intellectual property regimes support this accumulation, curbing fair competition and forcing market opening, backed by U.S. power. In this context, U.S. coercive options expand, including military coups, direct interventions, and IMF fiscal measures in peripheral countries (Harvey, 2005).

Similarly, in *Empire of Capital*, Ellen Wood (2003) argues that despite the apparent separation between political and economic power under capital's influence, the state remains central in safeguarding capitalist class interests and maintaining the social order necessary for accumulation. economic coercion prevails. In contemporary capitalist imperialism though extra-economic force (political, military, judicial) remains crucial to sustaining that order. Public indebtedness stands as the primary instrument of this imperialism, utilized by international organizations such as the IMF and World Bank to enforce structural adjustments that heighten the vulnerability of peripheral economies to pressures emanating from global capital, predominantly led by the United States. Wood (2003) underscores the necessity of overwhelming military power to manage the social order that facilitates capital accumulation, presently upheld by the USA.

Thus, 21st-century imperialism maintains its objective of exploiting the periphery for capital accumulation, albeit in a transformed guise. It represents a multifaceted phenomenon comprising interconnected political, economic, and military dimensions. Politically, strategies of control and influence by core countries over the periphery aim to exploit resources and markets, weakening local leaderships through neoliberal policies. These strategies are operationalized by unequal international institutions and agreements that limit peripheral development autonomy. Economically, there is exploitation of natural resources and labor, often via capital export by multinationals to boost profits. Militarily, imperialist countries deploy armed forces and interventions to safeguard their interests.

In sum, contemporary authors on 21st-century imperialism (Callinicos, 2007; Harvey, 2005; Wood, 2003) recognize the intersection of capitalism and militarism as constitutive of imperialism. They underscore the search for new forms and spaces of accumulation while reaffirming the renewed protagonism of the state in ensuring that process. This implies a dual dynamic in imperialist projection, in which inter-capitalist and interstate competitions coexist amidst struggles over influence, power, and wealth. The heuristic model identifies two dialectics: (1) in the capitalist world-economy, the dialectics between development by invitation and accumulation by dispossession; and (2) in the interstate system, between protection and extortion. The table below synthesizes our argument.

Table 1. Forms of Hegemonic and Imperialist Projection in the Modern World-System

Subsystems of the modern world-system	Hegemony	Imperialism
<i>Capitalist world-economy</i>	Development by invitation and internalization of costs of public goods	Accumulation by dispossession and labor overexploitation
<i>Interstate system</i>	Protection	Extortion

Source: authors' elaboration.

The classic authors of the early 20th century analyzed the dynamics of their age, characterized by escalating class contradictions, the emergence of revolutionary ideologies, and intensifying competition among great powers. They highlighted common elements such as: capital export from core to periphery (to raise accumulation), the formation of financial-industrial monopolies, the emergence of rentier classes, the coexistence of hybrid production systems (capitalist and non-capitalist, such as slavery), and the central role of militarism (use of violence) linked to the pursuit of power (Hilferding [1910] 1985; Luxemburg [1913] 1970; Kautsky, 1914; Lenin [1917] 2005; Bukharin [1918] 1984). These elements converge into two distinct clusters: capitalism and militarism. When associated with accumulation by dispossession, labor super-exploitation, and extortion, they indicate an imperialist projection within core-periphery relations, as proposed by our model.

3. THE STATE OF THE ART OF IMPERIALISM STUDIES: A QUALITATIVE ANALYSIS

To assess whether contemporary work on imperialism addresses both analytical dimensions - capitalism (with emphasis on accumulation by dispossession and labor super-exploitation) and militarism (involving extortion) - we conduct a qualitative analysis of the most-cited articles found in Scopus. We used the search terms “Imperialism” “Capitalism” and “State” in titles, abstracts, and keywords of the documents.² After applying relevant filters³, we identified 375 works on the topic, the earliest from 1962. We qualitatively analyze the six most-cited articles⁴ to identify (i) the concept of imperialism employed and (ii) the argument developed on that basis.

In *Life as Surplus: Biotechnology and Capitalism in the Neoliberal Era* (728 citations), Melinda Cooper (2008) argues that neoliberalism reinforced the alliance between the U.S. state, new-technology markets, and finance capital, driving research in the life sciences. Under U.S. influence, trade and intellectual-property rules favor the pharmaceutical, agribusiness, and biotechnology industries. Despite trade deficits and public debt, the dollar's central position attracts capital to the U.S., generating a vicious cycle of debt imperialism: peripheral countries are forced to borrow to ensure biosecurity yet lack the means to pay for patented products from the core. Meanwhile, life-science research contributes to military technologies. Cooper (2008) thus shows how biotechnology sits at the intersection of extortion and dispossession: extortion via bioweapons potential, and dispossession via pharmaceutical monopolies that secure extraordinary profits.

In *Food Regimes and the Production of Value: Some Methodological Issues* (107 citations), Farshad Araghi (2003) stresses the relationship between the global food regime and imperialism. He contends that neoliberalism has eroded the capacity of peripheral states (mainly in Africa and Asia) to satisfy their own food requirements. The specialization in primary commodities, exploited by agribusiness multinationals, renders these countries dependent on exports at the expense of domestic consumption. Drawing on the notion of embedded imperialism, Araghi posits that imperialism is rooted in global value relations involving states, global markets, and labor regimes seeking profits. Under neoliberalism, this produces a dichotomy between super-consumption and superabundance, on the one hand, and forced underconsumption and hunger, on the other. The study centers on dispossession, without examining its relation to extortion and the use of force by core states.

In *Imperialism and Resistance: Canadian Mining Companies in Latin America* (94 citations), Todd Gordon and Jeffery R. Webber (2008) discuss David Harvey's concept of accumulation by dispossession as a useful lens on the predatory practices of Canadian mining firms in Latin America since 1990. Using the concept of capitalist imperialism, they show that the pursuit for new spaces of accumulation results in violent, forced reorganization of local communities, which are made to submit to capital's interests, supported by both the home states of multinationals and the host states receiving investment. IMF-imposed structural adjustment eliminates trade and investment barriers, reduces public services and subsidies to local producers, and catalyzes the privatization of communal lands. This process arises from the convergence of extortion and dispossession.

In *Beyond the Theory of Imperialism: Global Capitalism and the Transnational State* (86 citations), William I. Robinson (2006) argues that capitalism entered a transnational phase in the 1990s. Contemporary imperialism is characterized by cooperation and conflict among genuinely transnational capitals that use transnational institutions - IMF, WTO - to impose their interests. Competition among these transnational capitalist classes unfolds via global conglomerates, regardless of country of origin, and does not always map onto interstate rivalry. Robinson highlights the rivalry between IBM and Cognizant Technology Solutions - both U.S. firms - regarding outsourcing contracts in India. International institutions, by imposing structural adjustment, facilitate transnational capital's entry into underdeveloped countries, enabling exploitation of local labor and natural resources. In transnational imperialism, exploitation manifests more subtly, facilitated by international institutions that advocate for peace and complementarity among nations, thereby obviating overt extortion between core and periphery.

In *Digital Colonialism: US Empire and the New Imperialism in the Global South* (85 citations), Michael Kwet (2019) argues that the United States is reinventing colonialism in the Global South through technological dominance. This unfolds through U.S. Big Tech's control of the digital ecosystem - software, hardware, and network connectivity. Such monopoly enables control over cultural, political, and economic aspects of social life by violating user privacy, directing advertising, and establishing surveillance capitalism - catalyzed by partnerships between intelligence agencies and multinationals. Kwet

² Initially, the terms “imperialism”, “capitalism”, and “militarism” were selected to denote the convergence of accumulation by dispossession and extortion as integral components of imperialism. Nevertheless, given the restricted scope of the results, “militarism” was substituted with “state” to underscore the state's instrumental role in employing force within imperialist endeavors and in the competition for international power.

³ We selected the areas of “Social Sciences”, “Arts and Humanities”, “Economics, Econometrics and Finance” and “Business, Management and Accounting” and limited the search to final documents, that is, works that have already been published, not including articles in progress.

⁴ The search on the Scopus Platform was carried out during the month of October 2022. The selection of the six most cited articles is due to the limited space for the inclusion of new works in this manuscript.

contends that Big Tech imperialism, together with digital colonialism, grants the U.S. unprecedented political, economic, and social power. Peripheral countries' assimilation of U.S. technologies results from this digital colonialism, whereby core tech corporations undermine local industries, dominate markets, and extract revenues. Kwet's focus falls mainly on the economic aspect of contemporary imperialism, with limited consideration to direct extortionary practices.

In *"Return to Empire: The New U.S. Imperialism in Comparative Historical Perspective"* (75 citations), George Steinmetz (2005) analyzes U.S. actions in Iraq. His concept of non-territorial/informal imperialism denotes the intersection of economic and politico-military characteristics. Economically, he emphasizes U.S. scientific-technological and productive monopolies that secure markets and raw materials, facilitated by neoliberal expansion. Politically, he highlights the diffusion of core practices and identities to dominated peripheries, emphasizing universalizing concepts - human rights, democracy, free markets - that diminish peripheral state capacities and intensify core surveillance. Militarily, he underscores the post-Fordist/flexible U.S. style of war - precision arms and pinpoint occupations - aimed at permanent capital accumulation and dissemination of U.S. values. Thus, non-territorial/informal imperialism results from the convergence of dispossession and extortion.

The following table classifies the six articles according to the model proposed in section 2. Column 1 lists the author(s). Column 2 presents the key concept adopted. Column 3 highlights the central theme that justifies the use of "imperialism". Column 4 maps our model's categories linked to the two spheres of the modern world-system - the capitalist world-economy and the interstate system - relating to the capitalist (dispossession) and territorialist (extortion) logics of power accumulation. According to our model, only when these two logics intertwine (capitalism and militarism) can we identify imperialist practices by core countries in peripheral regions.

Table 2. Classification of the most-cited Scopus articles based on the proposed heuristic model

Author(s)	Key concept	Theme	MWS categories
Cooper (2008)	<i>Debt imperialism</i>	The role of the life sciences in 21st-century U.S. imperialism: peripheral indebtedness, the rise of neoliberalism, and the militarization of biotechnology	Extortion & Dispossession
Gordon; Webber (2008)	<i>Capitalist imperialism</i>	Canadian mining companies in Latin America: predatory activities, state support, and forced reorganization of local communities	Extortion & Dispossession
Steinmetz (2005)	<i>Non-territorial imperialism</i>	U.S. imperialism contrasted with colonialism: economic, military, and political instruments (culture and diffusion of universalizing values) diffusing flexible accumulation	Extortion & Dispossession
Araghi (2003)	<i>Embedded imperialism</i>	Global food regime: super-exploitation of land in the periphery; dichotomy between abundance and forced underconsumption	Dispossession
Kwet (2019)	<i>Big Tech imperialism & digital colonialism</i>	Reinventing colonialism through technological domination: U.S. control of the digital ecosystem	Dispossession
Robinson (2006)	<i>Transnational imperialism</i>	Capital transnationalization as a catalyst of capitalist domination over the interstate system	Dispossession

Source: authors' elaboration.

The initial three articles (Cooper, 2008; Gordon & Webber, 2008; Steinmetz, 2005) present a conceptualization of imperialism encompassing both domains of the modern world-system - the capitalist world-economy and the interstate system - thus addressing capital accumulation in conjunction with interstate contestation and coercion. In the last three articles (Araghi, 2003; Robinson, 2006; Kwet, 2019), the focus falls mainly on the capitalist world-economy, with less emphasis on interstate rivalry and the use of force. These works consider imperialism an intrinsic element of capital accumulation, thereby disregarding the territorial and extortionary aspects of power.

It is evident, therefore, that the concept of imperialism, as incorporated into studies on (1) the North American monopoly in the life sciences (Cooper, 2008), (2) the predatory activities of mining companies from the center on the periphery (Gordon; Webber, 2008), and (3) the deployment of economic, political, and military instruments to disseminate Western values (Steinmetz, 2005), signifies the intersection between extortion and plunder. Furthermore, it is noteworthy that investigations into (1) the global food regime (Araghi, 2003), (2) control over the digital ecosystem (Kwet, 2019), and (3) the transnationality

of capital (Robinson, 2006) utilize a concept of imperialism wherein the primary focus is on capital accumulation (plunder), without an explicit resort to force.

The common element across all six studies is the emphasis on accumulation by dispossession under core monopoly power (scientific-technological and otherwise) through externalization of costs and subordination of the periphery. So, what implications can be drawn from this observation? Our qualitative analysis reveals that contemporary discussions of imperialism span a broad agenda (Big Tech, biotechnology), unlike the classical agenda centered on capital export, state-backed monopolies, and interstate rivalries. A lack of conceptual convergence is also inferred: three studies position imperialism at the intersection of extortion and dispossession, while three others emphasize capital accumulation alone - departing from the classical conception in which capitalism and militarism jointly constitute imperialism.

4. FINAL REMARKS

This article pursued three objectives: (a) to analyze the debate surrounding imperialism and hegemony; (b) to propose a heuristic model that sharpens the conceptual basis for empirical research on imperialist processes while contrasting them with Gramscian hegemonic leadership; and (c) to analyze the most frequently cited articles and topics in imperialism studies through the lens of the model. We proposed a heuristic model that contrasts two ways in which the core constrains the periphery: imperialism and hegemony. While some authors - Fiori, for example - stress interstate power competition as the system's driving force, others - such as Wallerstein - identify the international division of labor within the capitalist world-economy as central. We propose a dialectical relationship between these spheres, positing them as interdependent arenas through which the core constrains the periphery. This constraint is achieved either through consensual leadership and the internalization of costs (hegemony) or through extortionary force and the externalization of costs via dispossession (imperialism).

Our qualitative content analysis of the six most-cited Scopus articles shows that three articles incorporate militarism - use of force and extortion of peripheral regions - as a component of imperialism. All six articles, moreover, treat capital accumulation - via monopoly formation and the pursuit of extraordinary profits - as central. Categorization in Table 2 highlights the emergence of new themes linked to imperialism: biotechnology, the global food regime, mining multinationals, international organizations and transnational firms, the digital ecosystem, and the diffusion of Western values and principles. Although not the principal aim of our research, this incidental finding widens the horizon for future investigation.

In sum, the heuristic model proves relevant by identifying the convergence of the two fundamental spheres of the modern world-system: the capitalist world-economy and the interstate system. By recovering both dimensions of the classical debate - capitalism and militarism - the model helps draw conceptual boundaries between similar terms, in this case imperialism and hegemony. The analysis of the six most-cited articles further underscores the lack of consensus around imperialism, since some authors recognize only dispossession as its defining feature. This study thus reinforces the value of theoretical-conceptual work in equipping researchers to analyze empirical phenomena without conflating hegemonic and imperialist projections.

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